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ABSTRACT

This video discussion guide is intended for use in groups working toward large-scale systems changes in schools. It is designed to be appropriate for use in a three-hour workshop, an undergraduate or graduate course, or a training seminar. The guide and proposed workshop are both structured into eight sections. Recommended time allotment, objectives, preparation, process, and notes for the facilitator are presented for each workshop section in the guide. The sections cover: (1) "Introduction to the Learning Session" (its objectives and agenda); (2) "Why Are We Here?" (information about using large-scale approaches for change in systems such as corporations, education, and government settings); (3) "What Do We Need To Know?" (participants study and share three articles about a change formula, the history of large group systemic change, and real time strategic change (RTSC)); (4) "Components of a Large-Scale Event" (a case study illustrating how a three-day large-scale event contributes to a large-scale systems change); (5) viewing the video; and (6) a small group discussion focused on RTSC. Also included is a handout showing the application of the RTSC process to an educational reform effort in a Minnesota high school. The final section is a bibliography and list of Minnesota consultants. (Contains 50 references.) (DB)

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ED 434 421

Planning Our Future Together

Using a Large-Scale Systems Change Process for Educational Reform

Video Discussion Guide

John Stowe and Lynn Wells

Together We're Better:
Inclusive School Communities in Minnesota/
Partnerships for Systems Change

Institute on Community Integration (UAP)

The College of Education & Human Development
UNIVERSITY OF MINNESOTA

U.S. DEPARTMENT OF EDUCATION
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Inclusive School Communities in Minnesota/
Partnerships for System Change

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Published July 1999

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Overview of the Discussion Guide

The Rationale for the Guide

This discussion guide serves as companion to the video, *Planning Our Future Together: A Large-Scale Systems Change Process for Educational Reform*. We believe it is essential to use the guide with the video to —

- Know more about the principles and philosophy of large-scale processes that under-gird the applications demonstrated in the video.
- Understand more clearly the resources, time, and energy needed to make large-scale systems change a reality.
- Form a stronger foundation upon which a decision can be made to use a large-scale approach, specifically *Real Time Strategic Change* (RTSC), to develop fast, effective, and fundamental change in your system.

This guide is intended to be used by a trained facilitator to guide a group of persons interested in large-scale change approaches through a three-hour workshop. With some adaptations, this modular-formatted guide could be developed into a curriculum for an undergraduate or graduate course or a training seminar.

The Structure of the Guide

This guide has eight sections —

1. **Introduction**
   The *Introduction* is used to help all participants get acquainted and set a mood for open discussion and cooperative learning. The agenda, purpose of the session, and the learning objectives are discussed.

2. **Why Are We Here?**
In this section, information is provided about using large-scale approaches to bringing about change in systems such as corporations, and education, non-profit, and government settings. Using this information, the facilitator prepares and shares a summary with the participants.

3. **What Do We Need to Know?**
The participants study three articles using a *Jigsaw Activity*. The topics of study are *Formula for Change*, *History of Large Group Systemic Change*, and *Real Time Strategic Change* (RTSC). This exercise provides participants with opportunities to engage actively in learning more about the history, principles, philosophy and models used in large-scale interventions in general and RTSC in particular. A unique feature of this learning process is the teaching of new information several times to other participants as a way to know and understand the material quickly and effectively.

4. **Components of a Large-Scale Event**
This section uses transparencies to describe the following: how a three-day event fits within an overall timeframe of a large-scale systems change process, typical activities used in a large-scale event, the specific three-day agenda of Crookston High School and community, and the finances needed for a large-scale event and change process. The facilitator would use the information and prepare a 3 or 4 minute presentation. The presentation serves as an introduction to the video.

5. **Viewing the Video**
The facilitator introduces the video by reading the *What to Look For?* handout. The facilitator's notes contain a set of questions that can help participants know what to look for when watching the video. The viewers can use the handout to note which activities of an RTSC event they observe on the video. Using these two training aides, the participants can see and hear the principles and practices of RTSC being applied in a real situation.

6. **Small Group Discussion**
Following the viewing of the video is an opportunity for participants to share what they have learned, identify possible next steps for their system, and prepare a question or comment for the larger group. This activity simulates an RTSC event process called *Open Forum*. In this way, participants will experience one of the important processes that are used in a RTSC event.

7. **Crookston High School: Planning Our Future Together**
   By reading *The Crookston Story*, the learner will have a glimpse of how the RTSC approach worked with an educational system. The focus of this information is to provide highlights about the successes and challenges as well as the benefits and disappointments experienced within the Crookston High School and larger community throughout this large-scale change process. It also provides a 1998 update about what has happened since the three-day event occurred in August of 1996.

8. **Resources**
   Resources that can be used to learn more about large-scale systems change processes are provided. The resources include a comprehensive bibliography, individual consultants and organizations that design and implement large-scale change processes, consultants with a background in providing the logistics framework for successful large-scale events, and local and national training events or workshops.

The Role of the Facilitator

This discussion guide is designed so that someone with a background in effective group facilitation can lead participants through a structured set of activities and processes. It is not necessary for the facilitator to have a strong background in large-scale approaches. However, the facilitator does need to develop a basic understanding of large-scale processes and specifically RTSC. To gain this beginning competence, we suggest that the facilitator do one or more of the following —

- Contact one of the consultants listed in the *Resources* section to share the purpose and goals of the learning session; discuss issues and concerns; and explore knowledge, skills, and experiences related to large-scale approaches in general and RTSC in particular.
- Thoroughly review at least one written or multi-media resource listed in the *Resources* section.
- Read the article *The Crookston Story* and talk with principal, Allen Zenor, to discuss his experiences with RTSC. You can contact Mr. Zenor by calling (218) 281-2144, or by writing —

  Crookston High School
  402 Fisher Ave.
  Crookston, MN 56716

By leading one or more of these activities, a facilitator who is inexperienced with large-scale systems change processes would be an effective facilitator and helpful to the participants.

In some instances, a leadership group within an organization may already be working with an internal or external consultant on a change process. In this situation, the consultant might be the facilitator for the learning process.

No matter what option is chosen, a successful facilitator will be one who thoroughly reviews all the background material, makes adaptations to suit the audience, and adds personal experiences to strengthen the content. The facilitator should be able to use the video, this information, and the suggested activities to help participants make a decision about using RTSC in their system.

Format for Each Section

Each section of this discussion guide begins with an outline for the facilitator followed by the needed masters for handouts and transparencies. The handouts and transparencies are labeled and copies must be made by the facilitator for the number of participants that will be in the learning group.

The following components are described for each section —

Time

The time indicates a suggested amount of time to complete the section. The number in parentheses (# minutes, # hours) is the accumulated time from all previous sections.

Objectives

This area specifies the reason for the section or what is intended to be accomplished. The specific learning objectives for a section are listed here.

Preparation

Each section requires preparation by the facilitator. There are materials to read, handouts to distribute, transparencies to be copied, equipment to use, and other tasks to prepare for the section. The handouts and transparencies are provided as camera-ready masters for copying. Each handout and transparency is keyed to the specific section in which it is located. For example, *Section 2, Handout 1* means the first handout in *Section 2*.

One option is to distribute the handouts as they are needed during the session. A second option is to make a packet of all the participant's materials and distribute one packet to each participant prior to or at the beginning of the session. The guide is designed using option one. Either option requires the facilitator to plan ahead.

Process

This component describes the process and activities that we suggest the facilitator use to achieve the learning objectives. Usually, *Process* contains three parts: *Introduction*, *Activities* and *Closure*. The *Introduction* sets the context within which the learning will take place; learning objectives are stated. The *Activities* are individual and/or group discussions, exercises, brainstorming, problem-solving, and reading. *Closure* is a an opportunity for participants to reflect on, evaluate, or summarize the learning that has occurred.

Notes for Facilitator

These notes will provide background information about large-scale interventions, rationale for method recommended, or more detailed directions to help the facilitator run the session effectively.

Two sections in the manual, *The Crookston Story* and *Resources*, do not use this format. These sections could be additional handouts used during the group learning process.

Introduction to the Learning Session

Time

15 minutes (15 minutes)

Objectives

1. To introduce facilitator and participants.
2. To create an atmosphere conducive to learning.

Preparation

1. Prepare to introduce yourself, and include personal experience about systems and change.
2. Read the information about the ice-breaker (option A and option B), decide which one fits this group, and practice it if necessary. Or use an opening/welcome activity from personal experience.
3. Review *Agenda*, *Purpose* and *Objectives*, and decide what to emphasize.
4. Copy *Agenda* handout for each participant.
5. Copy transparencies *Agenda*, *Purpose*, and *Objectives*.

Process

1. Welcome the participants to the workshop. Introduce yourself and provide background information as necessary.

2. Choose an ice breaker from these two or use one based on personal experience —

A. Know Each Other

- Ask the participants to share the following (either in round robin fashion or randomly) —
  - What's one thing you expect to get out of this learning session?
  - What's one talent, hobby, or skill you have that no one or very few people know about?
  - Write the expectations in a word or short phrase on a flipchart.
  - Comment that as a group you will keep track of how well you are meeting the group's expectations.

B. Don't Know Each Other

- Ask the participants to share the following (either in round robin fashion or randomly) —
  - What is your name and the organization in which you work and job title?
  - What's one thing you expect to get out of this workshop?
- Write the expectations in a word or short phrase on a flipchart.
- Comment that as a group you will keep track of how well you are accomplishing the expectations.

3. Distribute handout *Agenda*.
4. Use the transparency *Agenda*, to describe **what** will be happening during this discussion session.
5. Use the transparency *Purpose*, to discuss **why** you are conducting this discussion session.
6. Thank the group for sharing during the icebreaker exercise. Ask if there are any questions about the agenda, purpose or objectives. State that we are now going to talk specifically about *Why Are We Here?*

Agenda

Overview of the Learning Session

Why are we here?

What we need to know?

Elements of a large-scale change event

Viewing the video

Small group discussion

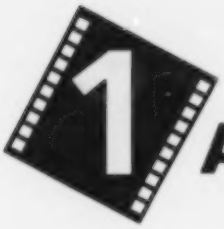
Closure

Purpose

1. Gain a basic understanding about an alternative approach for long-term visioning and planning in educational reform.
2. Use this learning to decide about applying Real Time Strategic Change (RTSC) in your organization.

Objectives

1. To know the teams needed to accomplish RTSC and identify the key role of each team (*Leadership, Design, Logistics*).
2. To discuss application of these systems change models to our system.
3. To know the history of large-scale systems change interventions.
4. To know vocabulary and language specific to RTSC.
5. To know the model for change, specifically the role of *Dissatisfaction, Vision*, and *First Steps*.
6. To know the work teams needed to accomplish RTSC and identify the key role of each team (*Leadership, Design, Logistics*).
7. To discuss application of these systems change models to our system.
8. To identify the resources needed to be successful in using RTSC in our system.
9. To decide what to do next as an organization, begin working toward RTSC, seek additional information about large-scale interventions, or consider another change process.



Agenda

Overview of the learning session

Why are we here?

What do we need to know?

Elements of a large-scale change event

Viewing the video

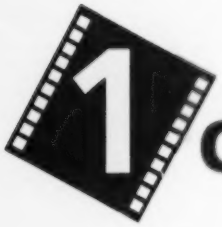
Small group discussion

Closure

Purpose

The primary purposes of this learning session are to —

- **Gain a basic understanding about an alternative approach for long-term visioning and planning in educational reform.**
- **Use this learning to decide about applying *Real Time Strategic Change (RTSC)* to a specific systems change process.**



Objectives

- To know the history of large-scale systems change interventions.
- To know vocabulary and language specific to *Real Time Strategic Change (RTSC).*
- To know the model for change, specifically the role of *Dissatisfaction*, *Vision*, and *First Steps.*
- To know the work teams needed to accomplish RTSC and identify the key role of each team (*Leadership, Design, Logistics*).
- To discuss application of these systems change models to our system.
- To identify the resources needed to be successful in using RTSC in our system.
- To decide what to do next as an organization: begin working toward RTSC, seek additional information about large-scale interventions, or consider another change process.

Why Are We Here?

Time

15 minutes (30 minutes)

Objectives

1. To clearly identify the purposes of *Planning Our Future Together* video discussion.
2. To provide rationale for considering Real Time Strategic Change (RTSC) for school reform.
3. To identify characteristics of large-scale systematic change.

Preparation

1. Review *Notes for Facilitator* and use the information to prepare a brief presentation to the participants.
2. Copy transparencies from the masters for *Change in the World* and *Large-Scale Systems Change for Educational Reform.*

Process

1. Use transparency *Change in the World.* Discuss the points from the first paragraph in the *Notes for Facilitator.*
2. Use transparency *Large-Scale Systems Change for Educational Reform* as you share information from paragraphs two through five.
3. Involve the participants by asking them about change in their lives. Ask someone to share an example of change on the professional level.
4. Ask participants if they have ever heard of or been involved in a large-scale systems change process. If yes, invite sharing of highlights.
5. Close out this section with a summary about change generally in the

world, the need for change in educational systems, why your system is discussing a change process, and why you want to involve the participants in learning RTSC and decision making today.

Notes for Facilitator

Background Information on Large-Scale Systems Change

In the fast-paced, complex, and global world we live in, leaders, managers, and administrators of businesses, non-profit organizations, and public institutions are expected to make changes more quickly, respond to stakeholder groups more effectively, and involve more people in these change processes than ever before. The education sector faces all of these changes — whether they are viewed as daunting demands or challenging opportunities.

Educational leaders must think more broadly, plan more systemically, vision more creatively, and engage all affected stakeholders more frequently to respond more effectively to the societal pressures of preparing students to be successful in the worlds of work, family and community. The traditional approaches to educating children and young adults are no longer viable or adequate. It is not good enough to try to make the current system better. Educational reform is necessary.

What is required is fast, comprehensive, and stakeholder-involved systemic change. To be successful, educational reform processes must include all of the key stakeholders. These stakeholders must minimally include: students; parents, school staff (teachers, education assistants, cooks, maintenance personnel, office staff, specialists, bus drivers, etc.); members of the business, civic and religious communities; representatives from state, local, and national government agencies and legislative bodies; and members of all union groups.

One arena for educational leaders to look for assistance in meeting the ever-increasing, overly complex and time-sensitive challenges facing them is the field of organizational development. Many organizational change consultants are quite intrigued with and excited by the emerging practice of working with whole systems to bring about significant, rapid, and strategic changes in organizations. While the fundamental approach of organization development consultants has always been to work with whole organizations or large units within organization, this new large-scale process is different in several fundamental ways.

The first difference is engaging all or most of the organization's employees in the change process, not just the executive team or the top managerial levels. This usually leads to more employees buying into and energizing the change process. A second important difference is that the pace of the initial change is faster — six months or less versus one to five — because all or most of the employees are trained together in large-scale events. A third critical difference

is that the organization's leadership makes available essential information to employees at all levels simultaneously rather than limiting key information to the top executives and managers. One final difference is that effectively developed large-scale systems change can produce more significant and quicker bottom line results for the organization than traditional approaches.

Designing a large-scale change process is challenging. Implementing a large-scale change event is an exciting and powerful process. Much of the challenge and excitement comes from employees experiencing the process of empowerment. In a large-scale approach, large numbers of persons literally feel transformed during the process because of their involvement in seeing change happen and in knowing that they have helped shape it. The number of persons participating together in one place at the same time for a large-scale change event has ranged from as few as 60 to as many as 2300. Whole system organizational development work and large-scale change processes can help those interested in making educational reform happen.

2 Change in the World

Change is a given in *our* fast-paced, complex, and *challenging* world.

Large-Scale Systems Change for Educational Reform

1. Traditional approaches to change are inadequate, slow, and inefficient.
2. Large-scale change is different because—
   - It involves and empowers all the participants.
   - The pace of change is fast and focused.
   - There is equal access to important information for all.
   - It simultaneously involves all stakeholders in the process.
   - It contributes to lasting results.
3. Assistance is available through the field of Organizational Development.
4. Large-scale systemic change is challenging and exciting.

What Do We Need to Know?

Time

50 Minutes (1 hour 20 minutes)

Objectives

1. To know the history of large-scale systems change interventions.
2. To know vocabulary and language specific to Real Time Strategic Change (RTSC).
3. To know the model for change, specifically the role of *Dissatisfaction*, *Vision*, and *First Steps* (Dannemiller Tyson Associates, *LLC*, 1994).

Preparation

1. Copy handout *Jigsaw Activity* for each participant.
2. Copy set of handouts *Formula for Change, History of Large Group Systems Change*, and *Real Time Strategic Change* (RTSC) for each group of three participants.
3. Assign the participants to groups of three so there is a maximum mixture of people in each group (e.g. an administrator, parent, teachers or elementary, middle and high school personnel in each group).

Process

1. Follow the directions on the *Jigsaw Activity* handout.

2. Assign participants to triads to study the information. Each person in the triad will choose a topic to study. Each person will find another person who is studying the same topic and they will study together and decide how to teach the content to the others in their triad. After the duo has studied, they will each find another person who studied the topic and teach to the new person, allowing time for feedback. After the topics are studied, and the teaching is practiced, the triads regroup to teach the three topics to each other.
3. The facilitator closes this section with a brief summary of the three topics.

Notes for Facilitator

The topics of study provide foundational knowledge for viewing the film and making informed decisions about the potential of this technique for your system.

Jigsaw Activity
What Do We Need to Know?

Form a triad (2 minutes)
Assign each member the letter A, B, or C.

Study to Teach (15 Minutes)

Each member find another person from a different triad with your letter. "A" find an "A", "B" find a "B", "C" find a "C". Each of you will study one component of a large-scale change approach and prepare to teach your section to your triad.

- "A's" study DVFR, model for change (*Handout 3-2*)
- "B's" study large-scale interventions history and overview (*Handout 3-3*)
- "C's" study RTSC, one particular process (*Handout 3-4*)

Study your section in a duo. In the pair, prepare the following —

- Meaning of the acronym
- Key points to know
- Examples of key points
- Why do we need to know this information
- Plan how to teach the information to your triad

Practice Teaching (15 Minutes)

Each person find another person from a different triad with your letter. "A" find another "A", "B" find another "B", "C" find another "C". Teach each other using your plan. Provide feedback to improve you teaching plan.

Teach the Triad (15 minutes)

Rejoin your original triad. Each of you teach your section. The goal is for all to understand each conceptual framework for long-lasting change.

A Formula for Change

All change is met with resistance. Change can bring stress and turmoil to a life. What is needed to overcome the resistance to change? What provides the energy to initiate change in an organization?

Dannemiller Tyson Associates *LLC* has developed a formula for change that serves as the cornerstone of all their work. It states that —

> ...for Change to occur, the product of dissatisfaction with the present situation (D), a vision of what is possible (V), and first steps to reach the vision (F) must be greater than resistance to change (R).
>
> **D x V x F > R**
>
> If any element is missing, the product will be zero. Since we all resist change to some extent, if the product is zero we will not overcome resistance and no change will occur. In other words, if people are able to absorb new information, they will see the world differently (a paradigm shift) and, once their paradigm shifts, their behavior will change as a result. (Used with permission of Dannemiller Tyson Associates, *LLC*, 1994, p.6.)

The three terms D, V, and F are defined as follows —

- *Dissatisfaction* is a clear understanding of the current reality which is not producing desired results. It does not involve finding blame, but rather allows all to state what currently exists. This could be in the form of records, data, annual reports, personal anecdotes, experiences, or examples.
- *Vision* is creating a preferred future that most in the organization would like and would yield positive results. Often the vision is founded on a philosophy that is acceptable to many in the organization. Although a leadership team may present an initial vision, all contribute to creating a preferred future.
- *First Steps* are the specific actions taken by one or many that will move the organization from where it is now to the preferred future. First Steps are practical and possible tasks which are assumed and executed by members of the organization.

In most organizations, a vision and strategy for change are developed in a top-down fashion and, consequently, there is a limited sense of dissatisfaction, a narrow and unshared vision, and/or a plan for action that is not aligned with a commitment to achieving the vision. Conversely, when a critical mass of people are invited and encouraged to participate in sharing what their dissatisfactions are, there is a common understanding of the organization's strengths and weaknesses. This pool of information can be used to help create a preferred future that is a composite of individual, small group, and total group ideas and start some important actions to begin moving toward the vision. The lack of motivation, disillusion, mistrust, and unaligned direction in the first scenario is replaced with excitement, synergy, hope, and community.

History of Large Group Systems Change

In their recent book, *Large Group Interventions: Engaging the Whole System for Rapid Change* (1997), Barbara Bunker and Billie Alban researched and discussed the history and early foundations of large-scale systems change processes. They explained that the history of large group interactive processes has three strands of development: *The Lewinian Tradition, The Tavistock Tradition*, and *Open Systems Theory*.

Within the first strand, Bunker and Alban discuss the work of Kurt Lewin (1930s and 1940s), who had deep concerns about the relationship of psychology to social problems. He became interested in the power of small groups to change people's behavior. Following up on Lewin's work in the 1950s, Ron Lippit, Leland Bradford, and Kenneth Benne developed a process of being a part of a group and reflecting on the group's process. This work led to a new social innovation called the "T" group or sensitivity training group. Building on this discovery, the three founded the National Training Laboratories (NTL), "an organization dedicated to helping people learn about groups and about themselves as members and leaders of groups. (Bunker & Alban, 1997 p. 15) Another significant contribution in this first strand, was Ron Lippitt's work related to "preferred futuring" (Bunker & Alban, 1997 p. 16) on large group strategic processes. He developed a process of working with communities in which the members designed a future they preferred rather than focusing on problems to overcome.

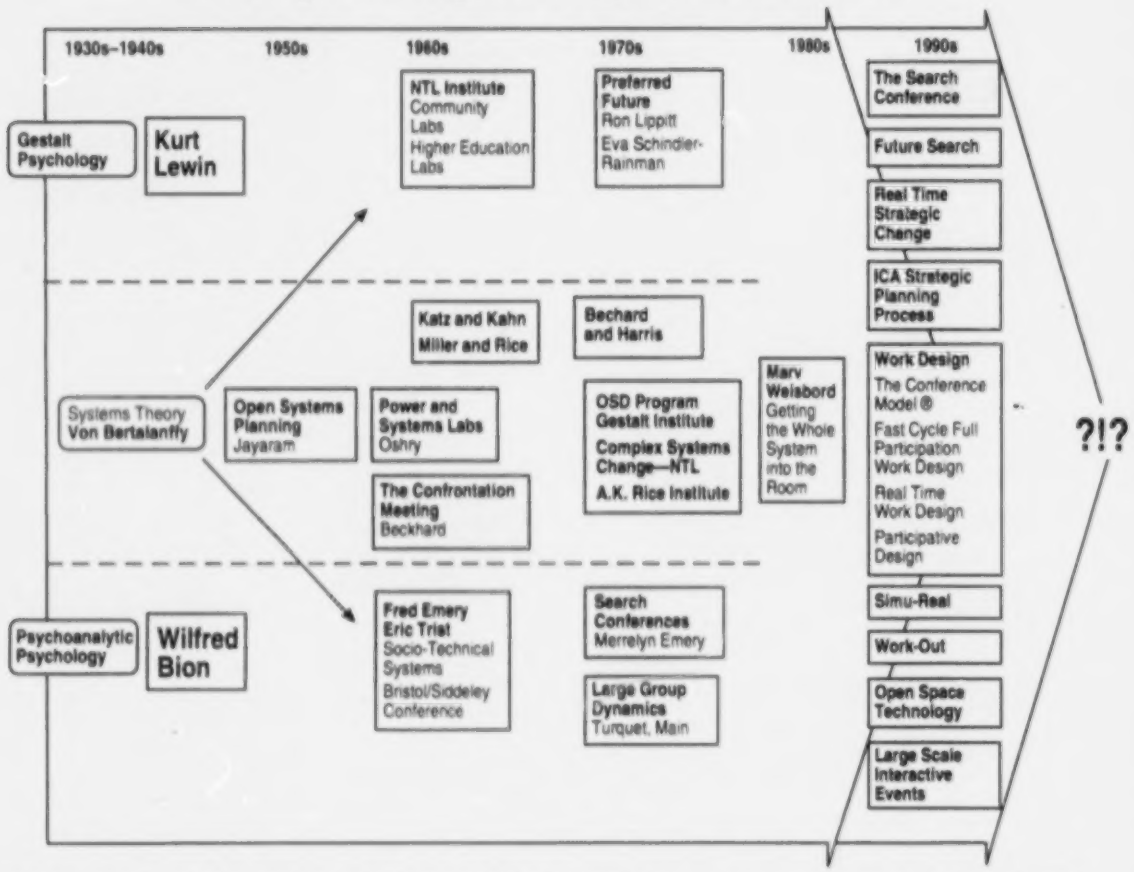
The second strand of the development of large group interventions was the Tavistock Tradition which grew out of Wilfred Bion's work using psychotherapy in England. The Tavistock Institute in London, England, "created to make social science knowledge applicable to individual group and system issues, began providing training in group processes using Bion's framework in 1957" (Bunker & Alban, 1997, p. 18). These ideas were taken to the U.S. by A.K. Rice who worked on the use of study conferences to explore the relationships of small and large groups. Bunker and Alban also discuss the efforts of Pierre Turquet (1975) and Tom Main (1975) regarding the dynamics of large groups that don't permit face-to-face interaction. Another important contribution within this strand was the development of Socio-Technical Systems developed by Eric Trist and Fred Emery. "They developed a process for analyzing and achieving the best fit of social and technical systems in organizations...." (Bunker & Alban, 1997, p. 19) This led to Fred Emery developing the Search Conference method.

The third strand of developing large group interventions, Open System Theory, had its origins in Fred Emery's work in which he used Ludwig von Bertalanffy's thinking about biology and applied it to viewing organizations as open systems. Bunker and Alban also emphasize the important work of Richard Beckhard

(Beckhard and Harris 1967, 1977, and 1978) in the area of "complex systems" in which the focus of study and practice within organizations shifted from small groups to larger units within organizations. In addition, they describe how Beckhard's invention, the "confrontation meeting," is a process for working with intergroup relationships. A final important contribution to open systems thinking was the work of Marvin Weisbord who was the first to talk and do something about "getting the whole system into the room" (Bunker & Alban, 1997, p. 24). He focused on involving internal and external stakeholders to identify emerging trends in an industry, to share what was and could be happening in the industry's environment, and to discuss the pitfalls and possibilities of both. Weisbord and Sandra Janoff developed the Future Search process.

This brief summary of the history of the foundations, principles, and applications of large group systems change approaches demonstrates that this emerging technology is firmly planted in organizational development theoretical frameworks and practices. Exploring the roots of large-scale change helps us understand the content and the process of Real Time Strategic Change (RTSC) more clearly and appreciate its potential for educational reform.

History of Large Group Interventions



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Real Time Strategic Change (RTSC)

One Large-Scale Interactive Process

One of the organizational development firms that helped develop the large group systems change movement was Dannemiller Tyson Associates, *LLC* (DTA) practicing in Ann Arbor, Michigan. Kathie Dannemiller and Chuck Tyson, the firm's co-founders, and several of their associates took the meaning of "large" in large-scale work to new heights when they consulted with the Ford Motor Company in the early 1980s and designed and implemented a three-day large-scale change event with 2300 employees and executives. They call their approach, Whole-Scale™ methodology. Within this approach, they developed *Large-Scale Interactive Process* (LSIP), and *Real Time Strategic Change* (RTSC). One of DTA's senior consultants, Robert Jacobs, wrote about the principles, practice, and applications of this large-scale process in a book entitled, *Real Time Strategic Change* (1994). Jacobs defines "real time" as "the simultaneous planning and implementation of individual, group, and organization-wide changes [that] . . .emphasizes the importance of current reality as a main driver throughout the process. . .working through real issues with the real people affected by them, and getting real results" (Jacobs, 1994, p 21). He defines "strategic change" as "an informed, participative process resulting in new ways of doing business that position an entire organization for success, now and into the future" (Jacobs, 1994, p 22).

To understand RTSC, this handout will compare it with traditional change processes. The first point of comparison is that the pace of the change process occurs in real time; the planning and implementation occur simultaneously and quickly. The initial planning for the real time change event may occur over a three to six month time period. Most traditional strategic planning and implementation processes occur over two to three years because of the "cascade" or "waterfall" effect. This means the process begins with the top management and gradually, in small groups, continues throughout the entire organization. One of the results of a slow change process is that the momentum needed for change can not be sustained from the beginning decision by the leader(s) through the training for the last worker to begin the change. Another devastating result may be that the change intended loses its relevance before full implementation occurs.

A second point of comparison is that the RTSC process includes everyone in the organization and it is empowering. The impact of these two variables are tremendously powerful and far-reaching. Once they are "invited to the table", participants of the RTSC process take ownership of the possibilities and challenges, become

involved in new and exciting learning activities, and accept responsibility for implementing actions they helped create. Jacobs says that "Change happens in organizations when people make change happen. . . . when they think and feel they are empowered individually and collectively to create a future for themselves that is different from their past" (Jacobs, 1994, p 61). With traditional change approaches, who will participate and when participation begins is decided by an executive group or managers. In a traditional change model, a few people attempt to persuade many others that change is needed. The effort usually fails because personal commitment is critical for successful change. Also, many employees have already experienced being "forced" to participate in failed change processes and have no reason to expect a different result from the same old procedure. When a critical mass of employees in the organization does not participate in the change process in a significant way, ownership, responsibility, and commitment will not happen and lasting change will not occur.

A third point of comparison of RTSC with more traditional change efforts is the importance and effect of building and maintaining a common database of critical information available to and used by all participants throughout the change process. In RTSC events, there is an exciting and energizing interactive and progressive process. First, individuals share information important to them. This sharing influences a small group's contribution, which, in turn, shapes the perspective of all. What results is a common pool of data that is used by individuals, small groups, and the group as a whole to make decisions, clarify perspectives, generate preferred futures, and stimulate commitment to action. As Jacobs comments in his book, "This process comes to represent a living metaphor of the changes taking place in the organization" (Jacobs, 1994, p. 64). With other planning approaches, information is a tool leveraged by top management. A few key executives, administrators, or managers decide how much information will flow, when it will be shared, and which organizational members will receive it. This narrow view — sharing minimal information and controlling ideas and prospective plans — can have serious negative consequences for an organization. It significantly reduces the possibility of employee ownership of the change process, reduces the scope of the plan, limits depth and breadth of creative ideas for the future, and lessens the commitment to implement the change plan.

The preferred future is created in the same way. Using initial comments and ideas from leaders, all contribute to the development of a preferred future. The emphasis is not on the current problems, which drain the energy of and resources from an organization, but towards creating a view of the possibilities. Energy grows in a group that imagines the possible as if it already were.

Throughout the process of RTSC, the whole organization is the driver of real concerns, toward real ideas for the future, with real commitment by all members. In traditional organization change models, the reason and possibility for change are management issues not to be shared with all employees.

A final point of comparison is that the RTSC process can and does create a community of informed and committed people who are aligned around a common strategic direction which they helped to create. With most traditional change approaches, there is no distinct focus on or intent on building community within the organization. Rather, there are small groups working separately, a lack of sharing information freely between groups and among organizational units, and a hierarchical structure that frequently impedes the development of community.

To effectively plan and conduct a RTSC event, a planning group must choose a set of processes to move from the current realities toward desired futures.

Real Time Strategic Change (RTSC)
A Comparison with Traditional Change Processes

	RTSC	Traditional Change
Pace of Change	Real time	Slow and incremental
Level and Type of Participation	Empower and include all stakeholders	Involve select managers and others to lead change
How and When Information is Shared	Build ongoing common database	Control timing and amount of information given
Strategy to Plan for Future	Preferred futuring	Problem-solving
Driving Force for Change Process	Reality is a key driver	Views of top management is key
Outcome of Change Process	Creation of community around aligned vision	Completion of tasks by a few toward uncommitted future

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Components of a Three-Day Event

Time

15 minutes (1 hour 35 minutes)

Purpose

To know vocabulary and language specific to *Real Time Strategic Change* (RTSC).

Preparation

Prepare for this 15 minute presentation in the following ways —

1. Read the article *The Crookston Story* (Section 7, page 40).
2. Copy handouts, *Typical Processes Used in a Event* and *Planning Our Future Together: Crookston High School and Community* for each participant.
3. Copy transparency and handout *Planning Our Future Together: The Crookston Story.*
4. Copy handout *The Crookston Story* (optional).

Process

1. Provide a brief overview of the content and process for this section of the workshop.
2. Distribute the handout, *Typical Processes Used in a Large-Scale Event.*
3. As you discuss the typical processes, weave in the following points —
   - Dynamic aspect to the three-day event, each activity builds on previous activities.
   - Purpose and assignment to max-mix groups.

- Flow of activities, information and process from individual to max-mix to large group.
- Equal access to all information, for all participants.
- Building common database.
- Unseen efficiency of the logistics team.

4. Distribute the handout, *Planning Our Future Together: Crookston High School and Community* discussing the highlights.
5. Put the transparency, *Planning Our Future Together: Crookston High School and Community*, on the overhead projector, and discuss the agenda with the participants.

Notes for Facilitator

Max-Mix Groups

One of the most common pieces of RTSC technology used in a change event is the "max-mix" group, which means a ***maximum mixture*** of the different types of people in the organization. In a school system, a max-mix group might be composed of a teacher, educational assistant, cook, secretary, principal, the district's curriculum director, student, parent and business leader.

A second critical feature of max-mix groups is that they are self-managed through a common set of group norms, rotating leadership roles (facilitator, recorder and reporter) and structured, yet flexible, activities. Through this mix of 8–10 people, participants complete their work with broader perspectives than any one member had before and gradually become a small working community.

The Flow of Information and Community Building

The flow of activities, information and process starts with the individual, who shares their information with the max-mix group, and the work of the small group gets shared with the large group. The dynamic quality of a large-scale event and the excitement of community building is also achieved through one or more of the following activities —

- *Group Report-Outs* is a process for sharing the work done in small groups with the "group-as-a-whole".
- *Post and Read or Post and Vote* occurs when small groups post their work on a wall for all participants to review, prioritize and learn what the whole community is thinking.
- *Cross-Functional Action Teams* are formed to begin implementing initial workplans.

Access to Information and Building a Common Database

Throughout the RTSC change process and event, information is shared, created, reviewed, voted on, and used for short-term and long-term planning. A unique feature of the "Real Time" approach, as well as other large-scale interventions, is that all participants (administrators, principals, teachers and non-teaching staff, students, parents, and community members) have equal and simultaneous access to all the information that is critical for visioning and strategic planning. As the information continues to be developed, it is available as a common pool of data for use by all the stakeholders.

The Design and Logistics Teams

Throughout a change event, the importance and impact of the design team and logistics teams are readily seen. Members of the design team are assigned responsibilities for introducing speakers and leading group activities, acting as catalysts in the max-mix groups, reviewing participant feedback at the end of the day, and generally knowing the pulse of what is happening throughout the course of the event. The logistics team members makes sure all supplies and instructions are available to the max-mix groups in a timely and efficient manner.

They ensure that the flow, efficiency and effectiveness of the event occurs in a seamless fashion. Kathy Dannemiller, one of the developers of the RTSC process, has said that with competent and well-prepared design and logistic teams, almost anyone can facilitate and be assured of a successful large-scale change event.

Typical Processes Used in a Large-Scale Event

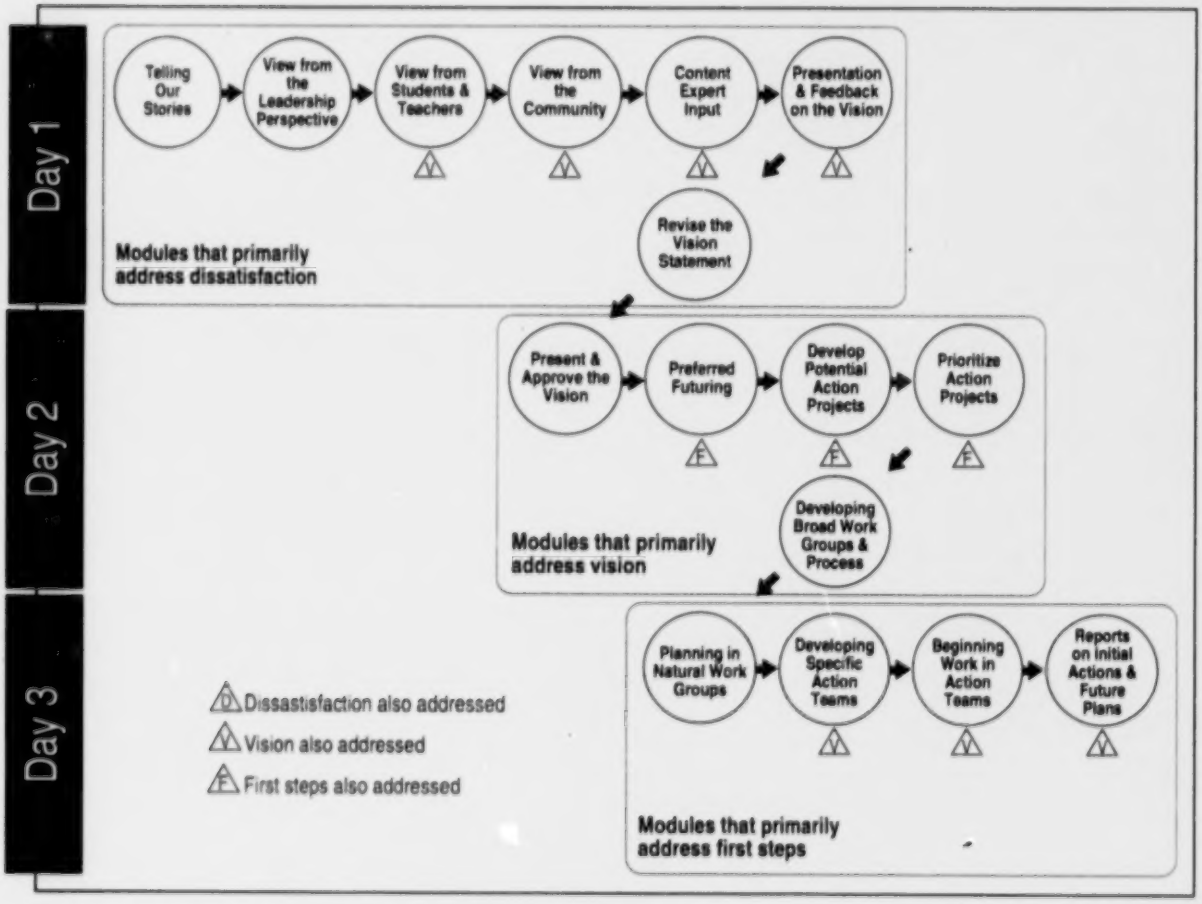
Title	Descriptions
Telling Our Stories	Participants have an opportunity to get acquainted with their team members in max-mix groups by sharing what they are proud and frustrated with in the organization and what they think the organization's most significant challenges and opportunities will be during the next year.
Content Expert Input	Participants hear from an expert from outside the organization on a number of possible topics such as: trends affecting the educational world or the latest technologies being used in schools. The intention is to expand people's point of view and to make more informed choices about the organization's future.
View From Customer's Perspective	In this type of process, participants hear from a variety of "customers" such as: students who have graduated or transferred out of the district, parents, and members of the community (business, human services, advocacy organizations). The focus of their presentations is on the challenges these persons are experiencing and what they need or needed from the educational system to help them meet the challenges. The purpose is not to blame, but to identify how people can work together to create a better future for the "customer" and the organization.
Feedback on Organization Strategy	In this module, participants have an opportunity to provide feedback on the organization's strategy (mission, vision, goals) presented earlier by the leader(s) or the leadership group.
Response From Leadership	The leadership group presents its revised strategy indicating specifically how the feedback was used and the rationale for incorporating certain pieces of information and not others.

Preferred Futuring	For each part of the new and widely-supported strategy, participants brainstorm specific responses to the following questions "It is 2 years from now, and you are pleased and proud of the progress we've made on this portion of our strategy. What do you see happening? What do you hear people saying? What do you feel tells you we are succeeding?
System-Wide Action Planning	Based on the results of the futuring exercise, each of the people in each of the max-mix groups is encouraged to sign up to work in one of the sub-groups on a specific portion of the strategy they have the most passion about. New sub-groups are formed and people review all the suggestions for action and develop a recommended plan of action.
Max-Mix Work Groups	A maximum mixture of persons in groups of 8-10 to obtain the widest perspectives and viewpoints on various issues and topics.
Open Forum	A process that usually occurs after a speaker or panel member has made presentations. Participants in small groups share what they have heard and what their reactions are, and identify questions they have. A reporter from the small group asks the question in the presence of the large group, and the expert offers a response.
Post and Read Post and Vote	Two processes in which the work of small groups is posted on the walls for all participants to (a) read and review to gain knowledge about what the organization's thinking is related to their future or about an issue, or (b) read and vote their preference so an issue can be prioritized and group action made easier.

Adapted with permission from Dannemiller Tyson Associates, *LLC.* (1994) *Real time strategic change: A consultant guide to large scale meetings.*

4 Planning Our Future Together:

Crookston High School and Community


Day 1
Telling Our Stories
View from the Leadership Perspective
View from Students & Teachers
View from the Community
Content Expert Input
Presentation & Feedback on the Vision
Revise the Vision Statement
Modules that primarily address dissatisfaction
Day 2
Present & Approve the Vision
Preferred Futuring
Develop Potential Action Projects
Prioritize Action Projects
Developing Broad Work Groups & Process
Modules that primarily address vision
Day 3
Planning in Natural Work Groups
Developing Specific Action Teams
Beginning Work in Action Teams
Reports on Initial Actions & Future Plans
Modules that primarily address first steps
D Dissastisfaction also addressed
V Vision also addressed
F First steps also addressed

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Viewing the Video

Time

30 minutes (2 hours 5 minutes)

Purpose

- To know vocabulary and language specific to Real Time Strategic Change (RTSC).
- To know the model for change, specifically the role of *Dissatisfaction*, *Vision*, and *First Steps*.
- To know the work teams needed to accomplish RTSC and identify the key role of each team (*Leadership, Design, Logistics*).

Preparation

1. Read *Notes for Facilitator*
2. Preview the video and read *The Crookston Story*.
3. Copy *Viewing the Video: What to Look For* handout for each participant.
4. Prepare the video in a VCR set-up with a screen large enough for all to see.

Process

- Distribute *Viewing the Video* handout.
- Read the directions and terms aloud. Reference information in the previous sections that apply.
- View the video as a group, all noting which components of a large-scale event are being employed.

Notes for Facilitator

The video, *Planning Our Future Together*, views the activities that took place at Crookston, Minnesota in August 1996. It also reviews the important processes and activities that occurred during the year prior to and 18 months after the large-scale event, until 1998. The film is intended to provide educators a glance at what RTSC can look like. How do hundreds of people work together over three days to begin to move an organization in a different direction?

It may be helpful to the facilitator to read *The Crookston Story* before this session. An important fact to reinforce is that the large-scale event is a dot on the timeline for change. Planning a large-scale systems-change intervention begins six or more months prior to a scheduled change event. Following the event there are action groups that work to carry out the possibilities identified during and after the event. But the true beginning of change for the organization is when participants in the three days are transformed into collaborative change agents.

Viewing the Video
What to Look For?

Directions

As we view the video, circle any of the elements of Real Time Strategic Change (RTSC) that you observe. Note questions for discussion at the bottom of the page.

Leadership Team	Design Team	Logistics Team
Max-Mix Groups	Report Out	Expert Presentation
Post and Vote	Open Forum	Panel of Stakeholders
Sharing the Vision	Action Teams	Preferred Futuring
Natural Work Groups	Celebration	Organizational Diagnosis
Dissatisfaction	Vision	First Steps
Follow-up Support	Equal Access	Building a Common Database

Comments and Questions—

Small Group Discussion

Time

55 minutes (3 hours)

Purpose

1. To discuss application of these system-change models to our system.
2. To identify the resources needed to be successful in using Real Time Strategic Change (RTSC) with our system.
3. To decide what to do next as an organization —
   - Begin working toward RTSC.
   - Seek additional information about other large group interventions.
   - Consider another change process.
4. To summarize *The Crookston Story* so participants have a beginning perspective of the RTSC process applied to educational systems.
5. To discuss local and national resources for the RTSC change process and other large scale interventions.

Preparation

1. View the video as a group.
2. Copy *Small Group Discussion* handout for each participant.
3. Assign participants to a max-mix group.
4. Review and copy *The Crookston Story* and *Large Group Intervention Resources* (optional).

Process

- Inform the group that this first activity models the *Open Forum* process described earlier and used with the RTSC approach.
- Distribute the *Small Group Discussion* handout to each participant.
- Explain the process for discussion and the group assignment to share one comment or question for the open forum.
- Facilitate a discussion with the participants using yourself or an organization design or large group process expert.
- Lead the group to decide if RTSC is going to be used for the change process in this school system, what additional information is needed, or what the next step should be.
- Distribute *The Crookston Story* and *Large-Group Intervention Resources* (optional).

Notes for Facilitator

This activity models the RTSC "Open Forum" process. You can act as the expert and respond to each max-mix group's questions or reflect on their group statement. An alternative approach is to use the "group-as-a-whole" as the expert and facilitate a brief and focused discussion.

Assign only three participants to each max-mix group to quicken the pace of the activity and to allow a little more time for each person to share. Encourage the group members to respond quickly to questions 1 through 4 (three minutes per person) then the group will select a group statement or question to share with the large group.

To discuss *The Crookston Story*, we suggest you thoroughly review the handout and prepare a brief summary that points out how Crookston's experience with RTSC demonstrates the principles and processes espoused by RTSC.

Another suggestion is to contact Mr. Zenor or one of the Minnesota consultants to obtain some first-hand information about an organization's concrete experience with RTSC or other large-scale intervention. In addition, these contacts will provide some specific information to share when discussing the *Large Group Intervention Resources* handout.

Small Group Discussion

What Did I See? What Do I Think?

Directions

1. Choose a facilitator for the small group to guide the discussion and to stay focused.

2. Each person shares their responses to the following questions with other team members (about 3 minutes per person).
   - What is one key learning gained from today's activities and video?
   - What do I need to know more about to contribute to our discussion or help make a decision about using RTSC?
   - How might what I learned be useful in our system?
   - What should be our next step?

3. As a small group prepare a comment or question for the large group. Decide who will be the group's reporter.

4. The reporter shares the group statement or asks the group question.

Crookston High School: Planning Our Future Together

An Application of the Real Time Strategic Change (RTSC) Process to an Educational Reform Effort in a Minnesota High School

The Crookston Story

In our fast-paced, complex, and global world, leaders and administrators of public institutions are expected to make changes quickly, respond to many groups effectively, and involve those groups in the change process. Education faces all of these challenges, sometimes viewed as daunting demands and at other times viewed as exciting opportunities. How did the leader of one Midwest high school, Crookston, in northwest Minnesota, decide that he wanted to face these challenges? By using the Real Time Strategic Change (RTSC) model to implement a change process within the high school system.

Al Zenor, principal of Crookston High School, was no stranger to change, personal and professional. As a teacher and administrator, he studied Bill Glasser's work on building quality in schools. As a new principal in Crookston, Zenor sought out teachers, parents, students and community members who had similar philosophies and began developing a small learning community. In addition, he searched for leaders from other school districts who had been successful with new education reform efforts.

Educational leaders think broadly, plan systematically, vision creatively, and engage others frequently in order to plan effectively to prepare students to be successful in the world of work, family, and community. Traditional approaches to educational change were not enough. What was required was fast, comprehensive, and foundational systemic change which involved all people concerned about the high school: all school staff; students; parents; members of the business, civic and religious communities; and representatives from local or state government agencies and legislative bodies.

In traditional change models, most of the work is completed through selected work groups which share their work results irregularly through such things as newsletters, unit meetings, or the "grapevine." In addition, the focus of the change teams is on completing tasks that are often determined by people in positions of authority. As one might imagine, a spirit of community will emerge very slowly or not at all through these traditional approaches. What is missing are some of the characteristics of community identified by Scott Peck, namely inclusivity, a safe place, a group of all leaders, consensus, and commitment (1987, Peck).

To fund new initiatives, Zenor explored various grant possibilities. The high school was successful with two grant writing efforts. One was through the Center for School Change and the other was through Together We're Better (TWB).

The Center for School Change funding resulted in the creation of a school-within-a-school model which focused on student-centered learning via the establishment of school/community partnerships, the development of student portfolio evaluation approaches, and the creation of project-based learning alternatives. In simple terms, the students worked with teachers to create projects for themselves using existing community events or programs. As the students began their project

they would discuss the things they wanted to learn with teachers. Together the student and teacher would hunt for places to achieve the learning, within the school or in the community of Crookston. Students maintained various records documenting their progress and gave a final presentation to a panel of three adults who were knowledgeable about the area being explored.

Together We're Better was a joint program of the Institute on Community Integration at the University of Minnesota and the Minnesota Department of Children, Families, and Learning. The focus of the partnership was to assist school communities in identifying issues related to the inclusion of students with severe or multiple disabilities in the context of school systemic change.

During the first year of Crookston's work with TWB, a core planning team was developed. Members of the core planning team were teachers, parents, administrators and community representatives. The team worked to gather data, set goals, and begin action planning toward a more inclusive school. During a summer training institute with TWB staff, one of the presentations compared traditional models of strategic change used by school systems with the large group change approach. Zenor was excited with the possibilities of using the large-scale systems change model at Crookston High School to strengthen the depth, breadth, and scope of educational reform.

The core planning team broadened their vision from focusing on the inclusion of students with disabilities in general education classrooms to creating and implementing a school community where all are valued, supported, and involved. The goal was that *everyone* be successful whether working alone, in a small group, as a part of the community, or through global partnerships. With this broader perspective, Crookston High School, under Zenor's leadership, began the challenging and exciting strategic planning process using the large-scale systems change approach, RTSC.

The funding from the Bremer Foundation and the Crookston's Chamber of Commerce was given to conduct long-range planning for the new high school building to be occupied by 9th–12th grade students and staff. These funds helped to support the large-scale system planning discussed in this paper.

So, What is Real Time Strategic Change?

Real Time Strategic Change (RTSC) is a set of processes used to help a group of people with a common concern to clearly identify what needs to be changed, create agreement about how things can be better and begin taking action to move toward the preferred future. The term "real time" is used because the change begins "right now" as the group meets together for a three-day change event; a majority of people involved with the organization meet to discuss issues, create a vision, determine who will do what to get the change started, and leave the three-day event ready to begin doing things in the new way the next day.

Of course the three-day event cannot happen spontaneously but requires planning by leaders, organizing by logistics personnel, and determining the best way for all voices to be heard by design people. Likewise for the next day changes to be long-lasting there must be support, resources and commitment over time.

How does a school of 100 employees, 400 students, and many more parents and community members orchestrate a successful three-day change event? Crookston was going to find out.

Leadership Team

Real Time Strategic Change (Jacobs, 1994) begins with recognition by a leadership team of the need for a new direction in the school. In a school, this leadership team may consist of the principal, program directors, union leaders, site-based management teams, involved community members, or members of the central office administration. The leadership team should consist of those who are leaders by position within the system and those who are recognized as leaders because of their past work and gained respect by others within the system. The leadership team can be as small as one, but often is larger to reflect the perspectives of all of those involved in the school community. School leaders will find that changes they could never achieve through management will be exceeded by successful change when they provide support, demonstrate commitment, and work in collaboration with others through RTSC.

The first question for Crookston was, "Who will be the leadership team?" Of course, Allen Zenor would be on the team, but who else? Should the RTSC leadership team be the TWB core planning team? Should other district administrators be a part of the leadership team? How did the strategic planning for change at the high school affect the other buildings in the district? In an attempt to answer these questions and determine staff reception to a large-scale change event, Crookston scheduled a one-day large-scale process for February. This day was an experiment in a large planning effort, but also would open communication between teachers, support staff, students, parents and community members.

The TWB core planning team was instrumental in executing the logistics plans for the one-day event. Private organization design consultants who specialized in communication were hired to design and facilitate the day. Through this one-day event it became clear that Allen Zenor was the recognized leader at the high school, and the visible and verbal support of the superintendent added strength to Zenor's leadership. Although key teachers and union representatives were needed to sanction Zenor's goals, others were not interested or able to contribute to the role of school leader. The leadership team was Principal Allen Zenor. Input from the participants at the February event provided ideas for Zenor to continually think about while fulfilling the leadership role.

As large-scale systemic change begins there are four tasks for the leadership team—

1. Begin to create a common database by examining the current reality of the school —
   - Where have we been effective in education?
   - Where have we failed?

2. Start to create a vision of the preferred future —
   - What qualities would we like to see in this school?
   - What are our images of success?
3. Decide which change method will be effective —
   - Do we utilize a traditional strategic planning approach or explore alternative models in which greater participation occurs?
4. Decide what immediate outcomes are desired from the change process.

The leadership team plays a vital role throughout the change process. Change is initiated by leaders when they develop a strategic planning process and format, invite participation in the change process, and support the implementation of the change actions. School leaders need the services of organizational design consultants to fully use the techniques currently available.

Design Team

Once the decision is made to use large-scale systemic change technology to address reform in the school, the leadership team selects members for a design team. The design team will be given the task of creating activities and processes for a three-day event that will be the catalyst for long-range systemic change. The design team members are a microcosm of the participants for the event, including resistors, supporters, front line workers, management, etc. Design team members are more than representatives of participants to the change event. They field test and provide focused feedback to plan the event.

Crookston design team members included the coordinators of the design team retreat, two consultants, the principal, and the logistics team leader, along with the following participants —

- 1 school board member
- 1 athletic director
- 3 high school teachers
- 1 bus driver
- 7 students
- 1 paraprofessional
- 1 school secretary
- 1 past student
- 1 correction system educator
- 1 post secondary educator
- 1 minority advocate
- 2 business/community members

The leadership team works with organization design consultants who are experienced with RTSC. In preparation for the design team, information is organized to be used in the creation of a common database, a first draft of the vision statement is

written, and a possible agenda for the three-day event is developed. The consultant will facilitate the design team members in exploring or experimenting with possible modules for the three days and will solicit feedback from all members. Each voice is important because each person is a reflection of others in the community with whom they share perspectives. The feedback provided by the design team members is used to fashion activities for the large group.

As the agenda for the three-day event is completed the design team presents the plan to the leadership team. After there is agreement about the plan for the large-scale change event, individuals volunteer to complete the tasks necessary to execute the plan with precision during the three-day event. Experts of large-scale systems change events predict the two most important components of a successful event are having a good design and excellent logistics. The goal is for these two critical components to be in place when the design team is finished with their job.

The following are the tasks to be completed before the three-day change event —

- Invite participants.
- Secure the meeting place and arrange for meals.
- Confirm expert speakers.
- Recruit, coach, and practice with panel members.
- Prepare name tags, agendas, and handouts.
- Assign confirmed participants to max-mix groups.*
- Prepare and practice presentations of modules.
- Locate all equipment needed for the event (e.g. audio system, visual equipment, flipcharts, computers, etc.).
- Order and organize all materials needed for the event (e.g. markers, color voting dots, file folders, paper and pens, etc.).
- Create a logistics map detailing each event and all needed tools.
- Train a logistics team.

*Max/mix groups are groups of eight to ten people who will work together throughout the change event, each group is assigned to maximize the mixture of people allowing for all to be exposed to various perspectives represented by the participants.

Crookston High School Planning Our Future Together

Purpose
To provide information, time, and structured opportunities for staff, parents, and students to develop a plan with measurable outcomes for achieving a vision based on consensus.

Outcomes
1. Informed and involved participants during the three-day event.
2. Have a vision, purpose and measurable plan to implement school change.
3. Commitment/support by participants to implement the change.

Expected Group Norms
- Be respectful
- All have something to offer, please share.
- Speak the truth kindly.
- Listen to understand others' points of view.

Vision
Crookston High School provides a safe environment and relevant, enriching learning opportunities for all students to succeed through —
- Mutual respect.
- Positive behavior and personal responsibility.
- Flexible curriculum, instructional practices, and activities.
- Parent/community support and involvement.
- Abundant resources.

Logistics Team

The logistics team for a three-day change event are general people with excellent organizational and clerical skills. Most often the team is led by an experienced leader, but in the Crookston situation there was none with experience available, so the consultants worked closely with two women from the community who were known for excellence in organization and detailed planning.

Using the manual *Real Time Strategic Change: A Consultant Guide to Large-Scale Meetings* (Dannemiller Tyson Associates *LLC*, 1994), the logistics leaders prepared to lead a team in providing the physical needs of the three-day event. The logistic leaders worked with the facility to select menu items that met the district budget, to arrange the large meeting room with the max-mix tables, and to identify the needed breakout rooms. They secured needed equipment and confirmed the services of equipment operators (e.g., video tape camera person). All supplies were ordered and organized prior to the three-day event, also.

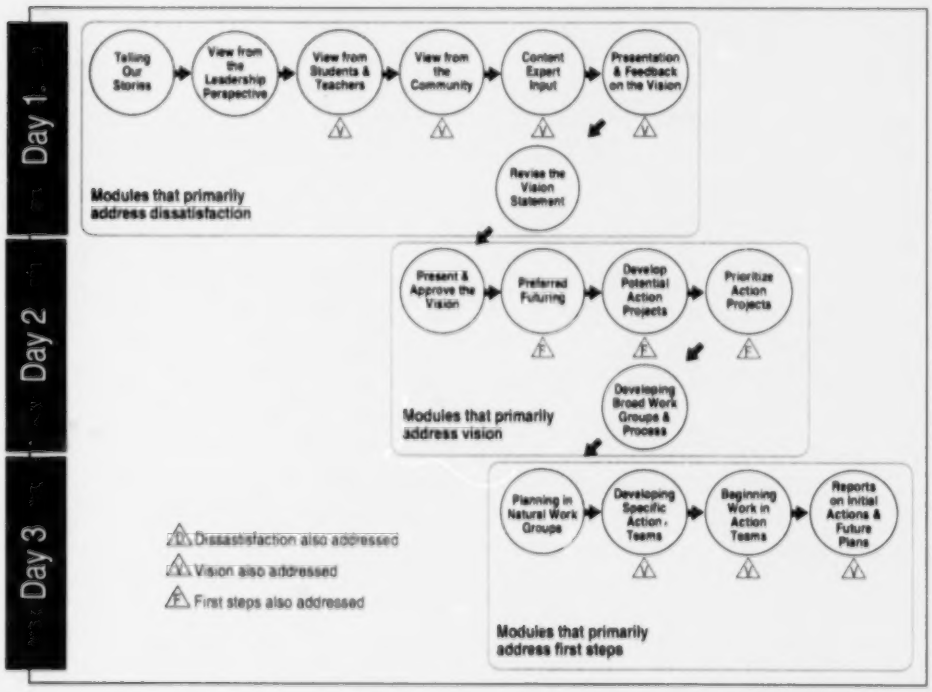
In Crookston, the logistic team was a student service group called The Leo Club. The service group provided 15 volunteers throughout the event. The volunteers were responsible for placing handouts on the max-mix tables as needed. They also provided each small group with needed supplies and flipcharts on cue from the logistic leaders.

During the large group activities, the Logistics Team members monitored use of microphones and directed participant traffic to result in a smooth transition from one activity to the next.

Three-Day Event

When the three-day event begins, every kind of emotion is present. The leadership team is excited in anticipation of long-lasting change. The logistics team is anxious to see if their detailed planning is complete and accurate. The consultants are confident in the process and hopeful about their skills to facilitate and adapt the process. The design team members are prepared for their roles as knowledgeable persons in small groups, as greeters, and when giving introductions for activities. Participants are wondering if this event is just another lip-service-regular-routine gathering and skeptical about imagining true reform for their school.

As in most RTSC events, day one was devoted to hearing many perspectives about the current status at Crookston's Central High School, and beginning to create a vision for the desired future. A booklet of facts, such as current and projected enrollment, student achievement scores, college entrance scores, and budget allocations was provided to each max-mix group. Several panels presented different perspectives about the high school's successes and visions for the future. All participants had the opportunity to voice their success and sorrow through max-mix groups, reports, or postings to all participants. The afternoon of day one was devoted to consideration and creation of a desired future through a mission statement.


Day 1
Day 2
Day 3
Telling Our Stories
View from the Leadership Perspective
View from Students & Teachers
View from the Community
Content Expert Input
Presentation & Feedback on the Vision
Revise the Vision Statement
Modules that primarily address dissatisfaction
Present & Approve the Vision
Preferred Futuring
Develop Potential Action Projects
Prioritize Action Projects
Developing Broad Work Groups & Process
Modules that primarily address vision
Planning in Natural Work Groups
Developing Specific Action Teams
Beginning Work in Action Teams
Reports on Initial Actions & Future Plans
Modules that primarily address first steps
Dissatisfaction also addressed
Vision also addressed
First steps also addressed

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The evening of day one is used by the consultants and leadership team, design team, and logistics team members to read the feedback from the participants and prepare modifications for the second day. There were comments about physical comfort, max-mix group efficacy, room layout, time constraints, adapting the modules for the specific participants, etc. Also the information for the vision generated and voted on by the participants was used to revise the vision statement. This revision was prepared for presentation and affirmation beginning day two.

Day two at Crookston began by presenting the newly revised vision statement and asking participants to demonstrate their acceptance. "All here who will support and actively work together to create this kind of a school please stand." The participants stood, clapped, and cheered because they saw that the vision was adjusted by their input and addressed their true concerns for an improved school in the future. The leadership team passed a critical test — Zenor had "walked the talk" and demonstrated that all are empowered.

The primary work of day two is to add detail to the preferred future or vision statement. Since the participants represent all interested in the school community, it is assumed that the critical information is available within the participants or in written form. During day two, specific need areas are identified and potential plans for improving the school are created. Participants meet in both homogeneous and heterogenous work groups to identify needs, responsibilities, and the support needed to make a meaningful change. Homogeneous work groups mean that teachers meet together, students meet together, parents meet together, business people meet together, etc. Heterogeneous group work was done in max-mix groups. As groups they begin to identify what contributions to make to move the school toward vision actualization. Some also began to identify what others could do that would be supportive of their contributions. This information is reported to all participants and used to begin planning specific actions to move the organization from the current reality to the preferred future. It is used to formulate possible initial action plans that begin to implement the vision. All vote on the potential action projects to prioritize which actions will begin first. All participants select the actual action plans through voting. All of the action ideas generated by the various groups are posted on a wall on large poster paper. Each participant is given time to read the plans and vote for those plans they feel will be effective to move the school toward the preferred future.

As with day one, the evening of day two is used by the consultants, leadership team, design team and logistics team members to read the participants' feedback about day two and make needed changes in the accommodations or activities for day three. The potential action plans and the results of the participants' voting are analyzed to select the work toward the vision that will begin on day three.

The primary work of day three is to begin work toward vision actualization. The results of day two planning and voting are reported to all participants. Every participant then selects areas of interest and work groups are formed to begin creating the specific action plans. As well as beginning the first steps to action, a goal of day three is to set-up a follow-up plan which provides continued support and focus to all efforts toward school reform.

Crookston Action Teams

The nine action teams evolved from three task force groups and are supported by an executive team. Each action team is comprised of a variety of stakeholders (i.e. students, staff, parents, etc.).

Vision

Crookston High School provides a safe environment and relevant, enriching learning opportunities for all students to succeed through —

- Mutual respect.
- Positive behavior and personal responsibility.
- Flexible curriculum, instructional practices, and activities.
- Parent/community support and involvement.
- Abundant resources.

Executive Task Force

1. Vision Support Team

Quality Work Place Task Force

2. Building Expectations (physical property)
3. Parent and Cultural Fun

Relevant Learning Task Force

4. Student-Centered Learning Plan
5. Activities as Learning
6. Community as a Resource

Resource Development Task Force

7. Community/District Resource Development (public relations, fundraising, marketing)
8. Materials Resources and Technology
9. Human Resources

Day three ends with reports of the initial planning goals and actions from each action team. As Crookston's three-day event came to a close, the participants realized that this closing was merely the beginning of an exciting adventure from the current reality (which had already begun to change) to the preferred future. Many participants felt that they were vital parts of a living school. Plans were designed that included all constituents in the process of lasting school reform.

Following the three-day RTSC event at Crookston, there were several tasks to be completed at Crookston —

- The information used to create a common database was the beginning of ongoing information which was used and expanded by the school.
- A document was created of the proceedings of the three-day event as a piece of the common database.
- The goals and action plans reported on day three were prepared and distributed to all action team members as the beginning of the record of the change process.

- Supplies, materials, and equipment needed for the event were returned.
- Bills for the facility, expert presenters, and consultants were paid.
- Required action team support was identified and provided on a short-term basis.
- The plan for bringing the vision to the public included contacting the media and providing an article with black and white photos.
- Many people were a part of the successful event and thanks were sent to each.
- Timeliness was a key to completing these tasks. Most were done within a week.

The Next Two Years

During the two years following the large-scale change event, Crookston High School and community experienced some successes and several disappointments. Some of the key successes included —

- Most of the action teams met on a regular basis and held quarterly meetings as a "group-of-the-whole" for support and collaboration throughout the first year.
- One action team wrote and received a grant and developed cultural events celebrating diversity among school and community groups.
- Several teams were integrated into ongoing school committees or school/community groups.
- Several articles were written by local and Minneapolis newspapers discussing the reasons for and the results of the three-day change event and follow-up activities.

Some of the disappointments —

- None of the major educational reform ideas were achieved (e.g., development of an individualized student-centered learning and planning process or an expansion of the school-within-a-school program).
- A lack of solid support (money, time, reinforcement of successes, etc.) from central administration hindered the growth and nurturing of the change process.
- Three major events (i.e., the worst flood in 100 years, a severe school district budget crisis, and a new superintendent) significantly impacted the growth of the change process and caused major morale problems.

Conclusion

Successful change efforts require a great investment in resources and risk-taking. From the beginning a RTSC event requires the involvement of many within the school. The involvement spreads to include a critical mass from the possible stakeholders and all participants must be engaged at the implementation level. Lasting change must be widespread and deep. Many members working on a variety of tasks for a common cause are necessary.

Real Time Strategic Change is a process for change in which the three-day event is only one essential component. This event involves all the people from a school and other stakeholders (e.g., students, parents, and other community members). The participants begin by examining the current reality of their school, then create a joint vision of the desired future, and finally identify the initial actions that will begin the change process. Real people, with real concerns about the way things are, use real time together to identify what they want and begin the real work of moving toward the preferred future.

Large Group Intervention Resources

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Consultants

Minnesota

Consultant	Area(s) of Expertise
Roland Sullivan Organization Development Consultant 20020 Vine Street Shorewood, MN 55331-8694 (612) 474-8363	Whole systems change • Large Group Interactive Events • Whole-Scale™ Methodology
Kristine Quade Organization Development Consultant 2000 Vine Street Shorewood, MN 55331-8694 (612) 474-6072	Whole systems change • Large Group Interactive Events • Whole-Scale™ Methodology
Jan and Jim Smith Resources for Change Organizational Effectiveness Consultants 3221 Woodbridge Street Shorewood MN 55125-3067 (651) 481-8103	Conference Model Work Design/Redesign Future Search ICA Strategic Planning Process Real Time Strategic Change
Marjorie Herdes and **Bill Stockton** Mobius, Inc. 4255 Meadowbrook Blvd. St. Louis Park, MN (612) 927-7141	Whole Systems Dialogue using the Mobius Model
Louise Miner Organization Development Consultant 2158 Hartford Ave. St. Paul, MN 55116 (651) 698-7585	Whole-Scale™ Methodology: • Large Group Interactive Events • Real Time Strategic Change
John Sauer Organization Change Consultant 6372 46th Street North Oakdale, MN 55128 (612) 626-0535 or (651) 773-1844	Real Time Strategic Change Open Space ICA Strategic Planning Process

National

Consultant	Area of Expertise	Training/Workshops/Videos
Barbara Bunker (716) 881-2166 and **Billie Alban** (203) 775-5042	Methods of Large Group Interventions	Conducts three 2 1/2 day workshops per year, and one-day orientation overviews for clients.
Merrelyn Emery (505) 646-1821	Open System Thinking (OST)	Conducts introduction, advanced, and statistics trainings. Five-day training courses are available through Institute for Resources Management, New Mexico State University.
Marvin Weisbord and **Sandra Janoff** Co-Directors, Future Search Network (800) 951-6333	Future Search Learning Workshops	Conducts public and locally-organized workshops. The videos, *Search for Quality*, and *Discovering Community*, are available through Blue Sky Productions, (800) 358-0022. Future Search Network (formerly SearchNet) member consultants do *pro bono* future searches, (800) 951-6333 or (215) 951-0328.
Kathie Dannemiller Dannemiller Tyson Associates, *LLC* (734) 662-1330	Whole-Scale™ Methodology and Real Time Work Design	Conducts training several times a year. Non-commercial videos developed by clients available.
Robert W. Jacobs and Frank McKeown Five Oceans Inc. (734) 475-4215	Real Time Strategic Change SM	Contact for information about training.
Institute of Cultural Affairs (ICA) (773) 769-6363 Fax: 773-769-1144	Technology of Participation (ToP) Facilitation Methods	Provides training throughout the United States
Dick and **Emily Axelrod** Axelrod Group (847) 251-7361	The Conference Model® — Large-Scale Organizational Change and Redesign	Conducts seminars several times per year. The video *Accelerated Work Redesign* is available through Blue Sky Productions, (800) 338-0022.
Bill Pasmore, Al Fitz and **Gary Frank** Organization Redesign Institute	Organization Redesign and Fast Cycle Full Participation Work Design	Contact Gary Frank for training information (303) 665-8797.

Consultant	Area of Expertise	Training/Workshops/Videos
Don Klein and **Alan Klein** Klein Consulting (410) 531-2913	Simu-Real is a simulation approach to organization change	Contact Klein Consulting for information.
Harrison Owen (301) 469-9269	Open Space Technology	Training is available regionally when organized by local groups.
A.K. Rice Institute (AKRI) (561) 744-1350	Group Relations Conferences in Tavistock tradition	Conducts trainings using the Tavistock group relations tradition of open systems and psychodynamic theories. AKRI offers conferences, training programs, professional meetings and publications.